DOCUMENT RESUME

ED 155 476 CE 016 987

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TITLE Organizing and Planning. Determine Requirements for and Utilization of Equipment and Supplies. Student Manual and Instructor's Manual.
INSTITUTION Clemson Univ., S.C. Vocational Education Media Center.
SPONS AGENCY South Carolina State Dept. of Education, Columbia. Office of Vocational Education.
PUB DATE 77
NOTE 9p.; For related documents see CE 014 491 and CE 016 911-989
AVAILABLE FROM Vocational Education Media Center, 10 Tillman Hall, Clemson University, Clemson, South Carolina 29631 ($160.00 for complete set, including nineteen filmstrips and eight overhead transparencies)

EDRS PRICE MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS Behavioral Objectives; Business Education; Business Skills; *Equipment Utilization; Instructional Materials; *Office Machines; *Office Management; *Office Occupations Education; Performance Based Education; Purchasing; *Supplies
IDENTIFIERS Vocational Technical Education Consortium States

ABSTRACT

Supporting performance objective 2 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on determining requirements for and utilization of equipment and supplies are included in this packet. (The packet is the first in a set of three on organizing and planning--CE 016 987-989.) The student materials include two cases (each structuring a situation requiring the development and identification of an equipment list) providing reference material for the learning activity and the instructor's final checklist. The instructor's manual includes notes to the teacher and a sample purchase requisition form. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the three packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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ED155476

ORGANIZING AND PLANNING

DETERMINE REQUIREMENTS FOR AND UTILIZATION OF EQUIPMENT AND SUPPLIES

STUDENT MANUAL

Prepared by

Pat Chapman

These materials support
Performance Objective 2 of the
V-TECS Secretarial Catalog

State Department of Education
Office of Vocational Education
Office Occupations Education
Columbia, South Carolina 29201

In Cooperation with

Vocational Education Media Center
Clemson University
Clemson, South Carolina 29631

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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OE 016 987

I. LEARNING ACTIVITY PACKET ON DETERMINING REQUIREMENTS FOR AND UTILIZATION OF EQUIPMENT AND SUPPLIES

Most secretaries, during the course of their careers, will be responsible for ordering and maintaining supplies and equipment for the office. The learning activity in this packet should be beneficial in helping them prepare for this phase of work.

II. PERFORMANCE OBJECTIVE

After study of related reference material (Cases, Office Procedures text and Typewriting text) and office supplies catalogs, the student in office procedures will be able to prepare a list of equipment to be used and the supplies needed to operate the office in case one or two efficiently.

III. PREREQUISITES

The student should have had or currently be enrolled in office procedures.

IV. LEARNING RESOURCES

Office procedures text
Office supply catalog(s)

V. LEARNING ACTIVITIES

Read the two cases in this packet and complete instructions.

CASE 1

You are employed as a general office worker in the firm of Nelson and McCants, a small partnership for distribution of wholesale grocery items to independent food stores. Mr. Nelson and Mr. McCants are usually in the office three to five days a week. It is necessary for them to write letters concerning shipments of grocery items from time to time. Frequently they are in the warehouse supervising orders.

Your duties as general office worker include:

1. Taking dictation in shorthand and from machine, then transcribing.
2. Answering all incoming calls and placing some outgoing calls.
3. Figuring payroll cards of ten warehouse employees.
4. Writing payroll checks for the ten warehouse employees and checks for payment of goods from manufacturers.
5. Typing invoices.
6. Greeting customers.
7. General office duties such as filing, stock control for supplies and equipment repairs, etc.

Using the above information, you are to prepare a list of necessary equipment and supplies for efficient operation of the office. Explain why each piece of equipment was chosen and its use. The supply list should include supplies for a three-month period. Submit the information to your instructor in typed form.

Use the following steps to help you in your determination of requirements and utilization of the equipment and supplies.

1. Analyze office tasks and procedures.
2. Determine necessary equipment.
3. Determine supplies needed.
4. Secure quotations on supplies.
5. Reorder supplies when necessary.
6. Prepare requisitions.
7. Establish a control system (in this one-person office, this should consist of supplies used and supplies left on hand).

CASE II

You are employed as a secretary in the home office of Smith, Thompson and Associates, an insurance agency which employs 46 agents statewide. The home office has three divisions: Life Insurance, Homeowners Insurance and Claims Division. You are in the Claims Division which handles a good deal of repetitive correspondence to the 46 agents as well as clients. In your office, you are the secretary and there are also three clerks who take dictation occasionally, transcribe a good deal from machine and do miscellaneous office jobs.

Your duties include:

1. Taking dictation and transcribing.
2. Typing proposals.
3. Ordering supplies and equipment after approval.
4. General office duties such as filing, answering the phone, making coffee, greeting clients, etc.
5. You are responsible for the issuance of supplies to the clerks and establishing a control system for supplies.

Using the above information, you are to prepare a list of necessary equipment and supplies for efficient operation of the Claims Division. Explain why each piece of equipment was chosen. The supplies should include the appropriate amount for a one-month period. Submit the information to your instructor in typed form.

Use these steps to help you determine equipment and supplies needed.

1. Analyze office tasks and procedures.
2. Determine necessary equipment. Furnishings are complete.
3. Determine supplies needed.
4. Secure quotations of supplies.
5. Reorder supplies when necessary.
6. Prepare requisitions for supplies.
7. Establish a control system for issuance of supplies.

Student _____

Date _____

Instructor's Final Checklist

Check the student's performance in the following elements of determining requirements for and utilization of equipment and supplies.
Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

		Student Performance			
		Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1.	Used suitable equipment to perform tasks.	[ ]	[ ]	[ ]	[ ]
2.	Used appropriate supplies for equipment.	[ ]	[ ]	[ ]	[ ]
3.	Used appropriate supplies for tasks.	[ ]	[ ]	[ ]	[ ]
4.	Obtained needed supplies.	[ ]	[ ]	[ ]	[ ]
5.	Provided adequate control of use of supplies and equipment.	[ ]	[ ]	[ ]	[ ]
6.	Stayed within budget.	[ ]	[ ]	[ ]	[ ]

ORGANIZING AND PLANNING

DETERMINE REQUIREMENTS FOR AND UTILIZATION OF EQUIPMENT AND SUPPLIES

INSTRUCTOR'S MANUAL

Prepared by

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NOTES TO TEACHER

You may wish to have the student perform only activities for one of the cases. It may be helpful for the instructor to assign a budget for each case.

The Instructor's Checklist, page 4, is a perishable item and should be duplicated for your use in evaluating each student's performance.

You should have available office supply catalogs for student's use in completing the learning activities. A purchase requisition is included for duplication should you want the students to prepare a purchase requisition for their equipment and supplies.

PURCHASE REQUISITION

Deliver To: _____ **Date:** _____

Location: _____ **Date Required:** _____

QUANTITY	DESCRIPTION